



## **Monthly BST Lead Meeting**

**August 22, 2006**

**10 am – 11 am**

### **Attendees**

David Smith, Agriculture	Margaret Wiggins, AOC	Shawnda Brown, DCCPS
Rick Stone, DCR	Chet Mottershead, Commerce	Rose Hendricks, Commerce
Byron Harris, DOC	Deborah Barnes, DHHS	Deanna Perry, DHHS
Paula Woodhouse, DHHS	Trisch Amend, NCHFA	Debra Lassiter, ITS
Becky Brown, DOL	Jim Knight, NC Education Lottery	Elsie Underhill, OAH
Julie Batchelor, OSC	Ursula Hairston, OSBM/Governor	Van Lindley, Revenue
Peter Goolsby, Sec. State	Lorrie Dollar, State Auditor	Angela Faulk, DOT
Cora Bright, DOT	Kim Padfield, DOT	Valerie Ford, DOA/Lt. Governor
Alan Sanders, DOJ	Dusty Wall, OSP	Carol Batker, Wildlife
Bryan Brannon, Wildlife	Cassandra Watford, DJJDP	Connie Boyce, NCSSM
Debbie Gunter, NCSA	Lowell Magee, BEACON	Andrew Koenigsberg, BEACON
Edward Brodsky, BEACON	Tom Legare, BEACON	Lori Foehr, BEACON
Chris Loso, BEACON		

### **Agenda Items**

- Project Status Update – Lowell Magee
  - BEACON HR/Payroll Project Team will review project status monthly with BST Sponsors/Leads
  - BEACON HR/Payroll Project Team is preparing schedule for Wave 2 Design Sessions set to begin in September
  - Edward Brodsky now serves as State Change Management / Communications Lead, replacing Shannon Byers; Shannon is going to graduate school and will now work with the project on a part-time basis
- BST Scorecard – Chris Loso
  - Tracks agency progress to complete key project activities
  - Allows agencies to document concerns that trigger additional support
  - Items tracked include attendance at monthly BST Lead and Sponsor meetings, communication survey request, position classification request, design session questionnaire responses, etc.
  - BST scorecard status tracks each task using a color code:
    - Green = task completed before/on due date
    - Yellow = task completed within 5 business days of due date; potential concerns may require discussion with BEACON HR/Payroll Project Team
    - Red = task not completed; BEACON HR/Payroll Project Team support required immediately
    - Pink = Task completion pending special circumstances; BEACON HR/Payroll Project Team support required immediately

- Draft BST scorecard information was presented for review; questions and suggested edits can be made to Edward Brodsky or Chris Loso
- BST scorecard will be updated weekly and posted in password protected area of BEACON HR/Payroll Project website
- Improving Communications – Edward Brodsky
  - In the project organizational risk assessment, agency leaders ranked project communications with agencies to be moderately effective, rating of 5 on 1 – 10 scale
  - BST Leads and Communications Agents role:
    - BST Leads are expected to take a visible role in communicating BEACON HR/Payroll Project information within their agencies:
      - Contact agency SMEs after Design Sessions to ask about what happened
      - Communicate issues/status of Design Sessions to agency leaders
      - Provide schedule of key agency meetings, communications vehicles, etc. to BEACON HR/Payroll Project Team
    - BST Team Leads and Communications Agents will plan and conduct targeted project awareness meetings with agency staff at least once per month:
      - Identify key agency meetings
      - Request time on meeting agenda
  - BEACON HR/Payroll Project Team support:
    - Will provide BST Leads and Communications Agents with monthly BST Communications Toolkit that contains relevant project information/presentations for awareness building within agencies
    - Provide timely web updates and new password-enabled links to BST presentation materials and workshop documentation
    - Onboard new Communications Agents
- Project Governance Structure Update – Edward
  - BEACON HR/Payroll Project governance structure involves many entities, but BSTs form the foundation for the activities performed on the BEACON HR/Payroll Project
  - BSTs facilitate and execute change management, communication, organization design and workforce transition strategies and plans
  - CMOC sets direction for BEACON HR/Payroll Project change management approach, making recommendations to BEACON PMO regarding change management issues
  - CMOC Members include representatives from Office of State Budget and Management, Office of State Personnel and Office of the State Controller
- Workforce Transition Overview – Tom Legare
  - Workforce Transition is a roadmap for managing the BEACON HR/Payroll job changes that will impact the State's workforce
  - Workforce transition activities provide agencies with an understanding of how jobs will change and guide HR function in transitioning workforce into these updated/new jobs
  - It is not a process to eliminate people's jobs or reduce the workforce
  - Workforce transition activities will address sensitive organizational issues and requires confidentiality
  - Seven primary workforce transition activities and expectations for the BSTs, BEACON Change Management Team and CMOC were explained (see presentation for details)

## **Next Steps/Action Items**

- **BST Action Items**
  - Communicate BEACON HR/Payroll Project information to agencies
  - Examine BST Scorecard information and determine areas that need to be addressed (contact Chris Loso at [christopher.losos@ncosc.net](mailto:christopher.losos@ncosc.net) with any concerns/questions)
  - Participate in Wave 2 Design Sessions
  - If appropriate, submit any remaining Design Session questionnaires
- **BEACON HR/Payroll Project Team Action Items**
  - Distribute Wave 2 Design Session invitations/communications
  - Update BEACON HR/Payroll Project website on weekly basis
  - Draft July/August edition of “The BEACON View” newsletter
  - Communicate organizational risk assessment findings
  - Develop communications toolkit for BST Leads/Communications Agents
  - Participate in State Employee Association of North Carolina Convention, Sept. 7-9

## **Upcoming BST Lead Meetings**

- Tuesday, September 19<sup>th</sup> (10-11 am)
- Tuesday, October 17<sup>th</sup> (10-11 am)
- Tuesday, November 14<sup>th</sup> (10-11 am)
- Tuesday, December 12<sup>th</sup> (10-11 am)

## **Questions/Answers**

Below are the answers to questions that were asked by participants during the BST Lead meeting:

### ***Can the BST Leads get copied on the Wave 2 Design Session email invitations sent to the Subject Matter Experts?***

Yes. As we moved forward with the Wave 2 Design Sessions, we will copy the BST Leads on the invitations sent to their agency Subject Matter Experts. We will also post a listing of the Wave 2 Design Session schedule and invited attendees for everyone's reference.

### ***Why do we need a password protected site within the BEACON HR/Payroll Project website?***

We understand that there have been some technical issues and that some BST members are not receiving emails containing links and/or attachments from the BEACON HR/Payroll Project Team. Therefore, the BEACON HR/Payroll Project Communications Team is in the process of updating the BEACON HR/Payroll Project website.

Enhancements to the website will include updating the website frequently with relevant information and communications while simultaneously creating a password protected section. The password protected section will allow us to better assist each of you by placing the presentations, invitations, questionnaires and other relevant documents in one central place that can be accessed at your convenience. When new documents/information is posted in this section we will send you an email with the appropriate link.

Furthermore, we are looking at ways with which to make updates, schedule changes and other announcements concerning the BEACON HR/Payroll Project via the website. We will inform you of these updates once they have been made.

### ***What is the difference between the Wave 1 and Wave 2 Design Sessions?***

In the Wave 1 and Wave 2 Design Sessions, we are gathering detailed information about the current ("As Is") and future ("To Be") processes. The BEACON HR/Payroll Project Team is documenting this business process information into detailed business requirements, both normal business requirements and exceptions, which will help us configure the new HR/Payroll system. The information gathered during Wave 1 Design Sessions will be validated in Wave 2 Design Sessions. In addition, we will develop and review detailed "To-Be" processes with SME participants during Wave 2. This information will be used as final validation to address any remaining issues and exceptions to the "To-Be" processes. The BEACON HR/Payroll Project Team is also introducing SAP terms and concepts to the SME participants in these Design Sessions.

### ***Are you gathering any system reporting requirements from agency leadership (i.e., CIOs, CFOs, etc.)?***

Yes. We have met with Subject Matter Experts from the agencies during the Design Sessions to discuss business reporting requirements. We are also planning to meet with various agency leadership and management to discuss their reporting requirements as well.

***When are we going live with the BEACON HR/Payroll system? Who is going to be included in each of the three waves?***

There will be three waves for the BEACON HR/Payroll system rollout. We are currently scheduled to go live with the first wave in October 2007, the second wave in January 2008 and the third wave in April 2008. We will be announcing the agencies that are going live in each of these waves within the next few months.

***Why haven't universities been involved with the BEACON HR/Payroll Project over the past few months?***

Since mid-June, we have been working with the University of North Carolina's General Administration and the Banner Project Team on items associated with the BEACON HR/Payroll Project. We recognize the large university resource time commitment associated with the Banner Project and other related initiatives. Thus, we decided not to make additional information requests from the universities over the summer. We are meeting with representatives from the North Carolina university system on Friday, August 25<sup>th</sup> at 10 am to discuss next steps. The BEACON HR/Payroll Project Team will communicate pertinent information to the universities as we move forward.

***Is it true that all of the agencies are going to move to a bi-weekly payroll system?***

A move to a bi-weekly payroll alternative is currently under evaluation. However, a final decision has not been reached at this time. We anticipate providing an update during the upcoming Wave 2 meetings.

***Will we be able to review the blueprinting documents from the Wave 1 Design Sessions and offer feedback?***

When they are completed, the blueprinting documents will be posted on the password protected area of the BEACON HR/Payroll Project website. Once they are posted, you will have the opportunity to review these documents and provide feedback. Agency and university Subject Matter Experts will also have an opportunity to offer feedback during the Wave 2 Design Sessions.

***What is going to happen with the Career Banding initiative and what is its impact on the BEACON HR/Payroll Project? Furthermore, why was the Personnel Development Design Session canceled and will it still be included as part of this implementation?***

The North Carolina General Assembly recently authorized a legislative study commission through Senate Bill 1741 to review the State Personnel Act, including the current classification system and career banding program. Under this legislation, career banded classifications limited to those approved by the State Personnel Commission on or before June 15, and implemented prior to February 1, 2007, will be included in this phase of the HR/Payroll project.

Because of restrictions placed on career banding by this legislation, the BEACON Program made the decision to revise part of the BEACON HR/Payroll scope and to postpone the implementation of the personnel development module within SAP. The personnel development functionality within SAP is closely tied to the career banding concept and includes the performance appraisal process and competency tracking. Once the Legislative Study Commission has evaluated career banding, the BEACON HR/Payroll Project will then address the personnel development functionality in a future phase based on the direction of the General Assembly.